

# Farm Transition & Estate Planning

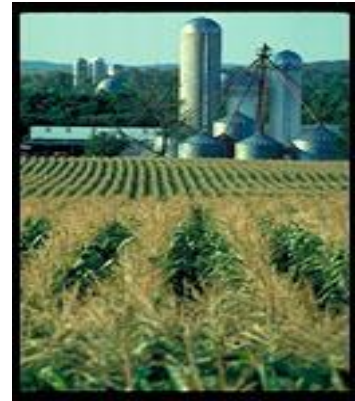
ORGANIZATION INFO  
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## Program Evaluation

A few months ago, you attended a program entitled “Farm Transition and Estate Planning: Build Your Exit Strategy”. The program focused on setting goals, farm transfer strategies, financial and tax issues, estate planning topics, and developing a written transfer plan.

To help us measure the effectiveness and impact of our program efforts towards strengthening your business goals, we need your help. Please take a few moments to complete the evaluation on this page. Answering the questions with as much detail as possible can improve how we help you reach your goals via additional educational support and/or resources.

Please do not put your name on the evaluation. That way your responses will remain confidential.



**When you have completed the evaluation, please return it no later than (insert date) using the enclosed, stamped envelope.**

*Thank you for your time and valuable input!*

## Program Evaluation

1. Have you/your family started to develop/up-date your farm business transfer plan?

Yes \_\_\_\_ No \_\_\_\_

If yes, how far along are you in the process ? (please check response closest to your progress):

25% completed \_\_\_\_ 50% completed \_\_\_\_ 75% completed \_\_\_\_ 100% completed \_\_\_\_

2. Have you started to develop/up-date your personal estate plan?

Yes \_\_\_\_ No \_\_\_\_

If yes, how far along are you in the process ? (please check response closest to your progress):

25% completed \_\_\_\_ 50% completed \_\_\_\_ 75% completed \_\_\_\_ 100% completed \_\_\_\_

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3. **What obstacles or problems have you encountered, that have slowed or stopped your progress in starting or finishing your farm transfer and estate plans?** Please list personal/family issues such as not being able to develop goals as well as external/non-family issues such as not being able to find an attorney or accountant to work with.

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4. **Has the workbook you received, been a useful reference for you?**

Yes \_\_\_\_ No \_\_\_\_

**Please list any comments/suggestions you have about the workbook:**

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5. **In addition to the workbook, are there any other tools in the way of resources and/or people that would help you complete your farm transfer and estate plans?**

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6. **Please rate the quality and usefulness of the workshop you attended.** (please circle your response):

1-poor      2-fair      3-neutral      4-good      5-excellent

7. **If you were to attend a second farm transition & estate planning workshop, what specific topics would you want included? What type of workshop format would best help you to accomplish your goals?**

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*Thank you for your time and valuable input!*